

Section Overview

Introduction The objective of this section is to provide detailed instructions for starting, bond allotments and for stopping bonds or individual allotments. This section applies to active duty members and those reservists on Extended Active Duty.

Individual Allotments are disbursed as a single check payment to an individual, financial institution, vendor, insurance company, etc., as long as the allotment is for a legal purpose. EFT payments for allotments are mandatory.

In this section Detailed instructions for the following items are discussed on the page indicated.

Item	See Page
Bond Allotment Starts (Type B1 and G1)	20-B-2
Bond Allotment Stops (Type B1 and G1)	20-B-5
Dependent Allotment Stops (Type D1)	20-B-6
Home Loan Allotment Stops (Type H1)	20-B-7
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Loan Repayment Allotment Stops (Type L1)	20-B-9
Individual Allotment Stops (Type O1)	20-B-10

Bond Allotment Starts

Before you begin

There are two types of bonds. Series “EE” bonds are purchased at a cost of half of the face value of the bond. Procedures for starting them are on this page. Series “T” bonds are purchased at full face value of the bonds. Procedures for starting them are on page 20-B-3

How to Prepare Bond Allotment Starts for Series EE Bonds

Bond Allotment starts for series EE: (opens segment 78 in PMIS/JUMPS)

After entering Purpose Code “B1” in the Alt Type field and entering “Start” in the Alt Action field from the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), and pressing <GO> or <F1>, a message will be displayed telling you to “Verify that member has enough projected pay to cover allotment amount”. If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start EE Bond Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
Frequency: _____		
First Deduction Date: _____		
SSN of Owner: _____		
Co-owner/Beneficiary: ____		
SSN of Co-owner/Beneficiary: _____		

Begin filling in the fields as follows:

Field	Action																		
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.																		
Monthly Deduction Amount	Enter one of the following valid amounts (or press <F2> for a listing, highlight the valid amount and press <GO> or <F1>): <table><tr><td>Amount</td><td>Description</td></tr><tr><td>100.00</td><td>\$200.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>12.50</td><td>\$100.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>125.00</td><td>\$500.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>25.00</td><td>\$100.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>250.00</td><td>\$500.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>50.00</td><td>\$100.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>500.00</td><td>\$1000.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>62.50</td><td>\$500.00 Face Value with 4 Monthly Deductions.</td></tr></table>	Amount	Description	100.00	\$200.00 Face Value with 1 Monthly Deduction.	12.50	\$100.00 Face Value with 4 Monthly Deductions.	125.00	\$500.00 Face Value with 2 Monthly Deductions.	25.00	\$100.00 Face Value with 2 Monthly Deductions.	250.00	\$500.00 Face Value with 1 Monthly Deduction.	50.00	\$100.00 Face Value with 1 Monthly Deduction.	500.00	\$1000.00 Face Value with 1 Monthly Deduction.	62.50	\$500.00 Face Value with 4 Monthly Deductions.
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500.00	\$1000.00 Face Value with 1 Monthly Deduction.																		
62.50	\$500.00 Face Value with 4 Monthly Deductions.																		
Frequency	Automatically filled-in based on amount entered.																		

Continued on next page

Section B
INDIVIDUAL ALLOTMENTS

Bond Allotment Starts, Continued

How to Prepare Bond Allotment Starts for Series I Bonds

Bond Allotment starts for series I: (opens segment 78 in PMIS/JUMPS)

After entering Purpose Code "G1" in the Alt Type field, entering "Start" in the Alt Action field from the "Start, Stop, Change Allotments or Bonds (Screen 1 of 1)", and pressing <GO> or <F1>, a message will be displayed telling you to "Verify that member has enough projected pay to cover allotment amount". If sufficient projected pay exists, press <SPACEBAR> to continue. The following screen should appear:

Start I Bond Allotment (Screen 1 of 2)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction Amount: <u>0000.00</u>		
Frequency: _____		
First Deduction Date: _____		
SSN of Owner: _____		
Co-owner/Beneficiary: ____		
SSN of Co-owner/Beneficiary: _____		

Begin filling in the fields as follows:

Field	Action																																				
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.																																				
Monthly Deduction Amount	Enter one of the following valid amounts (or press <F2> for a listing, highlight the valid amount and press <GO> or <F1>): <table><tr><td>Amount</td><td>Description</td></tr><tr><td>12.50</td><td>\$50.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>25.00</td><td>\$50.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>50.00</td><td>\$50.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>37.50</td><td>\$75.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>75.00</td><td>\$75.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>25.00</td><td>\$100.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>50.00</td><td>\$100.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>100.00</td><td>\$100.00 Face Value with 1 Monthly Deduction</td></tr><tr><td>50.00</td><td>\$200.00 Face Value with 4 Monthly Deductions.</td></tr><tr><td>100.00</td><td>\$200.00 Face Value with 2 Monthly Deductions.</td></tr><tr><td>200.00</td><td>\$200.00 Face Value with 1 Monthly Deduction.</td></tr><tr><td>125.00</td><td>\$500.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>250.00</td><td>\$500.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>500.00</td><td>\$500.00 Face Value with 1 Monthly Deduction</td></tr><tr><td>250.00</td><td>\$1000.00 Face Value with 4 Monthly Deductions</td></tr><tr><td>500.00</td><td>\$1000.00 Face Value with 2 Monthly Deductions</td></tr><tr><td>1000.00</td><td>\$1000.00 Face Value with 1 Monthly Deduction</td></tr></table>	Amount	Description	12.50	\$50.00 Face Value with 4 Monthly Deductions.	25.00	\$50.00 Face Value with 2 Monthly Deductions.	50.00	\$50.00 Face Value with 1 Monthly Deduction.	37.50	\$75.00 Face Value with 2 Monthly Deductions.	75.00	\$75.00 Face Value with 1 Monthly Deduction.	25.00	\$100.00 Face Value with 4 Monthly Deductions	50.00	\$100.00 Face Value with 2 Monthly Deductions	100.00	\$100.00 Face Value with 1 Monthly Deduction	50.00	\$200.00 Face Value with 4 Monthly Deductions.	100.00	\$200.00 Face Value with 2 Monthly Deductions.	200.00	\$200.00 Face Value with 1 Monthly Deduction.	125.00	\$500.00 Face Value with 4 Monthly Deductions	250.00	\$500.00 Face Value with 2 Monthly Deductions	500.00	\$500.00 Face Value with 1 Monthly Deduction	250.00	\$1000.00 Face Value with 4 Monthly Deductions	500.00	\$1000.00 Face Value with 2 Monthly Deductions	1000.00	\$1000.00 Face Value with 1 Monthly Deduction
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Frequency	Enter the correct frequency: M – Monthly B – BI Monthly T – Tri Annual																																				

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Bond Allotment Starts

**How to
Prepare Bond
Allotment
Starts,
Continued**

Field	Action
First Deduction Date	Enter Year and Month of first deduction (e.g., starts for April 1998 would be entered as 9804).
SSN of Owner	Pre-filled with SSN of member.
Co-owner/Beneficiary	You must enter either "C" for Co-owner or "B" for Beneficiary.
SSN of Co-owner/Beneficiary	Enter ssn or leave blank.

Once you have entered the information on this screen, press <GO> or <F1>. The following screen should appear:

Start Bond Allotment (Screen 2 of 2)		
060-00-0005	SA	DALLAS, STEVE
Bond Owner		
First Name: STEVE		Last Name: DALLAS
Co-Owner/Beneficiary: _____		
Example: Dan L. Jones (if co-owner/beneficiary does not have a middle initial/name DO NOT put NMI or NMN, only enter the First and Last names).		
Bond Owner's Address		
Address: _____		
City: _____ State: ____ ZIP: _____		

Begin filling in the fields as follows:

Field	Action
First Name and Last Name	Pre-filled and non-editable.
Co-Owner/Beneficiary	Enter name of Co-Owner or Beneficiary.
Bond Owner's Address	Enter Street address, City, State and Zip. Or press <F2> while on the Street address field for a list of existing addresses to copy.

When finished filling-in all required fields, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of "C" for Complete. If you do not see all allotments listed, press <F5>.

Bond Allotment Stops

How to Prepare Bond Allotment Stops

Bond Allotment stops:

Highlight the “Current” Bond allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Bond Allotment with an Alt Action of “Current”. If a Bond Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Bond Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0050.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Dependent Allotment Stops

How to Prepare Dependent Allotment Stops

Dependent Allotment stops:

Highlight the “Current” Dependent allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Dependent Allotment with an Alt Action of “Current”. If a Dependent Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Dependent Support Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	<u>DALLAS, STEVE</u>
Effective Date: _____		
Monthly Deduction: 0050.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Home Loan Allotment Stops

How to Prepare Home Loan Allotment Stops

Home Loan Allotment stops:

Highlight the “Current” Home Loan allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Home Loan Allotment with an Alt Action of “Current”. If a Home Loan Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Home Loan Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0450.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Commercial Life Insurance Allotment Stops

How to Prepare Commercial Life Insurance Allotment Stops

Commercial Life Insurance Allotment stops:

Highlight the “Current” Commercial Life Insurance allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Commercial Life Insurance Allotment with an Alt Action of “Current”. If a Commercial Life Insurance Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Commercial Life Insurance Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0010.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Loan Repayment Allotment Stops

How to Prepare Loan Repayment Allotment Stops

Loan Repayment Allotment stops:

Highlight the “Current” Loan Repayment allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1)”, press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop a Loan Repayment Allotment with an Alt Action of “Current”. If a Loan Repayment Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Loan Repayment Allotment (not to blanket payee) (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0100.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.

Individual Allotment Stops

How to Prepare Individual Allotment Stops

Individual Allotment stops:

Highlight the “Current” Individual (O1) allotment you desire to stop in the “Start, Stop, Change Allotments or Bonds (Screen 1 of 1), press <GO> or <F1>, enter “stop” in the Alt Action field, then press <GO> or <F1>. The following screen should appear:

Note: You may only stop an Individual (O1) Allotment with an Alt Action of “Current”. If an Individual Allotment exists in PMIS/JUMPS but does not appear on the scroller screen with a “Current” status, contact a member of HRSIC’s SDA II maintenance team.

Stop Individual Allotment (Screen 1 of 1)		
060-00-0005	SA	DALLAS, STEVE
Effective Date: _____		
Monthly Deduction: 0100.00		
Last Deduction Date: _____		
Allotment Number: 002		

Begin filling in the fields as follows:

Field	Action
Effective Date	Enter the effective date of the transaction. Usually the date the member signed the allotment worksheet or date indicated to start particular action.
Monthly Deduction Amount	This amount is pre-filled and non-editable.
Last Deduction Date	Enter Year and Month of last deduction (e.g., stops for April 1998 would be entered as 9804).
Allotment Number	Pre-filled. Should correspond to the entry on member’s LES.

Once you have entered the information on this screen, press <GO> or <F1>. You will be returned to the Allotment scroller and should see the allotment listed with a Tran Stat code of “C” for Complete. If you do not see all allotments listed, press <F5>.
